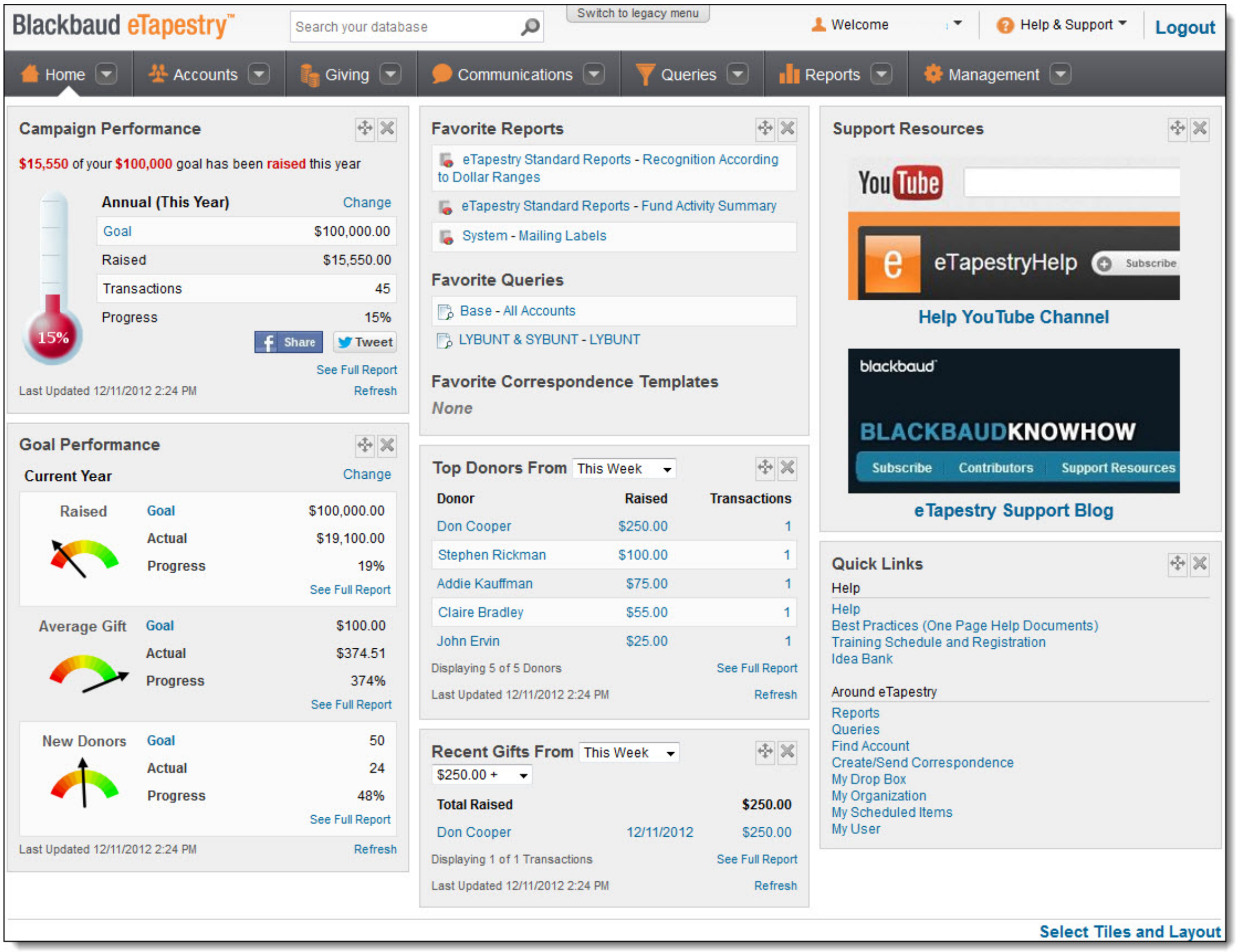
eTapestry New Features

This guide lists new features in ***eTapestry*** 7.8.0, released on April 21, 2013.

Menu Redesign

We redesigned and reorganized the ***eTapestry*** navigation menu. The new design streamlines navigation and is more intuitive to help you find what you need. The new tabs house relevant areas of the program and highlight the most commonly-used options in each area to make it faster and easier to move through the database.



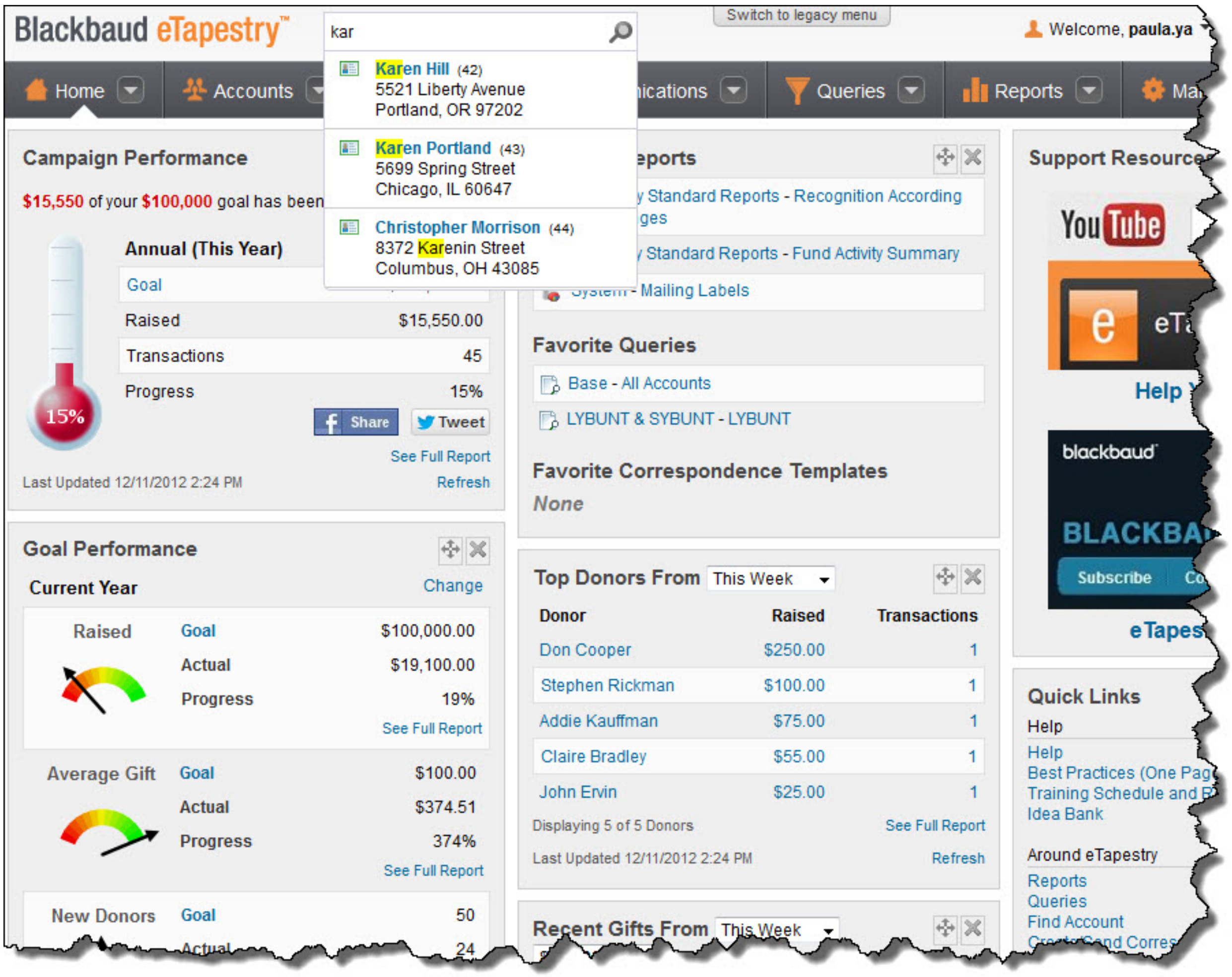
You can toggle back and forth between the legacy menu and the new design until the next release. After this period, only the new menu will be available. To revert back to the legacy menu, from the new design click **Switch to legacy menu** at the top of the screen. To access the new menu from the legacy design, click **Try the new menu!** at the top of the screen.

To see a detailed comparison of the legacy and new menus, see the New Menu Quick Reference Sheet.

New Dynamic Search Option

In the new menu design, when you use the quick search bar to search for an account, possible matches are now displayed as you type. To select one of the options, click it in the drop-down that appears underneath the search bar. ***eTapestry*** looks for possible matches in names and addresses.

Note: You must type at least three characters in the search bar before possible matches display.



This dynamic search is turned on by default, but if you do not want it to be active under your user login, you can turn it off. From the Management tab, click **My User**. On the Preferences tab, deselect **Use Dynamic Account Search** under Search Preferences and click **Save And**.

Note: This option is not available if you are using the legacy navigation menu.

Enhancements to DIY Forms

We made the following enhancements to DIY forms. To access DIY Forms, from the Management tab click **DIY Forms** under Online Presence.

Payment Processing Enhancements on DIY Forms

We made some changes to payment processing in DIY forms.

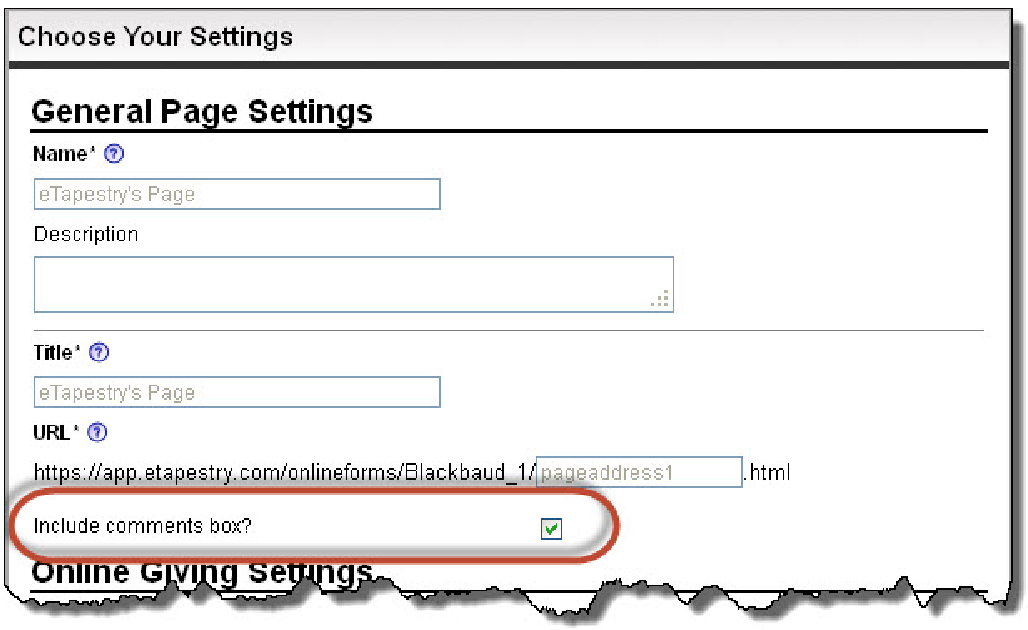
- **Select Payment Processor:** On the configuration screen for your transaction forms, you can now select the payment processor you want to use for transactions received through the form. When you configure the form, select your preference in the **Transaction Processor** field. To allow electronic fund transfers through the form, select the **Include EFT** checkbox. To make these selections for an existing form, from the form editor click **Settings**.

- **Automated Clearing House (ACH)/Direct Debit Payments:** You can now choose to accept ACH/Direct Debit payments on transaction forms. When constituents select to pay through ACH/Direct Debit, they must complete the **Routing Number**, **Account Number**, and **Account Type** fields. These fields are defaulted automatically into the Payment Information section when donors select this payment method.

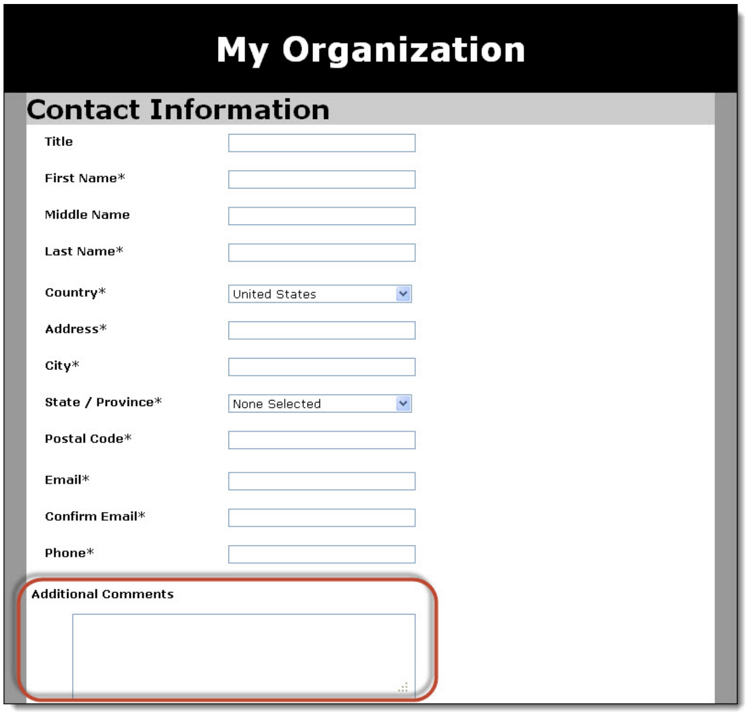
  To select what payment methods you accept on a form, from the Payment Information section click **Edit** and select whether you want to accept credit cards, ACH/direct debits, or both. You must edit any existing pages to make this selection.
- **Name on Card Field:** The **Name on Card** field is now included by default in the Payment Information section of all transaction forms. This field maps to the **Name on Card** field in the payment record for the constituent who submits the form.

Comments Box for DIY Forms

You can now include a comments box in any of your DIY forms. In the configuration screen, select the **Include comments box?** checkbox. You can access the configuration screen when you create a new form. From an existing form, click **Settings**.



The comments box appears on your published forms and maps to the comments box on the transaction or contact record.



Membership DIY Pages

For membership DIY pages, the **Membership Level** field is now required and you must include a price associated with each level. The **Membership Type** field is not required. Previously, you had to include either the **Membership Level** or **Membership Type** field and could associate a price with either field.

User-Defined Field Set for Volunteer Information

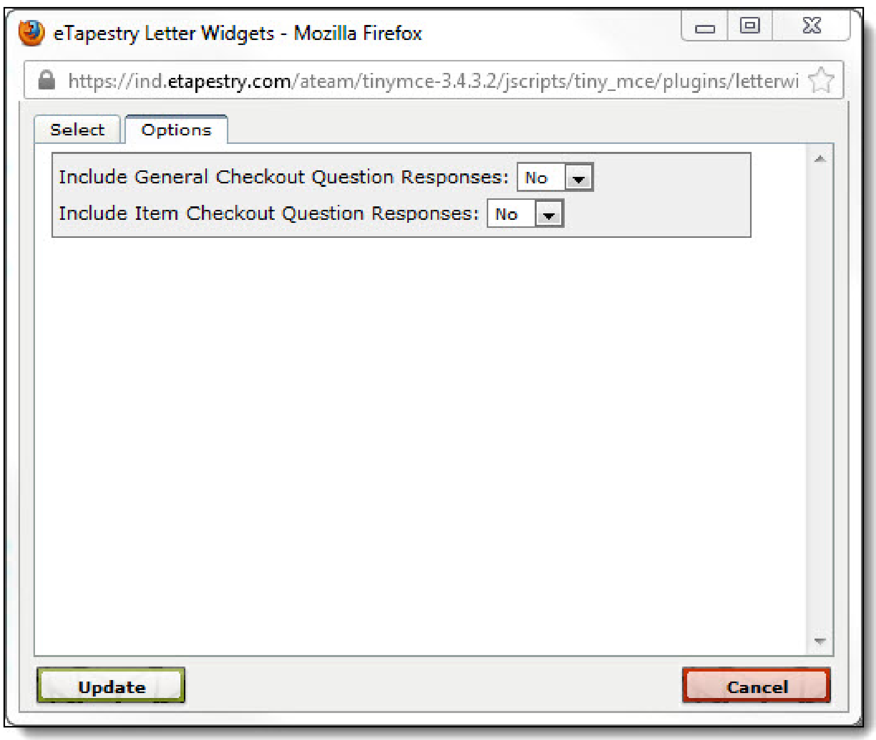
We have pre-populated useful user-defined fields to use with volunteer information. These fields can help you track information about your volunteers and are based on best practices for managing volunteer information in ***eTapestry***. Unlike other field sets, you cannot choose which volunteer fields are included when you select this set. When you add it, the entire list of volunteer fields are added automatically. In addition, when you add this field set, ***eTapestry*** creates a new query category and a new report category for volunteer information. These are populated with default queries and reports for information tracked in these fields.

To access field sets, from the Management tab click **User-Defined Fields** under Database Configuration. Under Defined Field Sets, click **Add Defined Field Sets** and click **Volunteer Fields** to see the new volunteer set.

Include Checkout Questions in Cart Order Details Email

When you configure your cart, you can include questions on your cart template. You can now include checkout questions and answers in the order details confirmation email. You include the questions and answers in the order details email template.

1. From the Communications tab, click **Manage Communications**. The Correspondence Categories page appears.
2. Click **Cart Templates**. The Cart Templates page appears.
3. To edit the order details template, click **Order Details**. The editor appears.
4. Double-click anywhere inside the editor. The Letter Widgets screen appears.



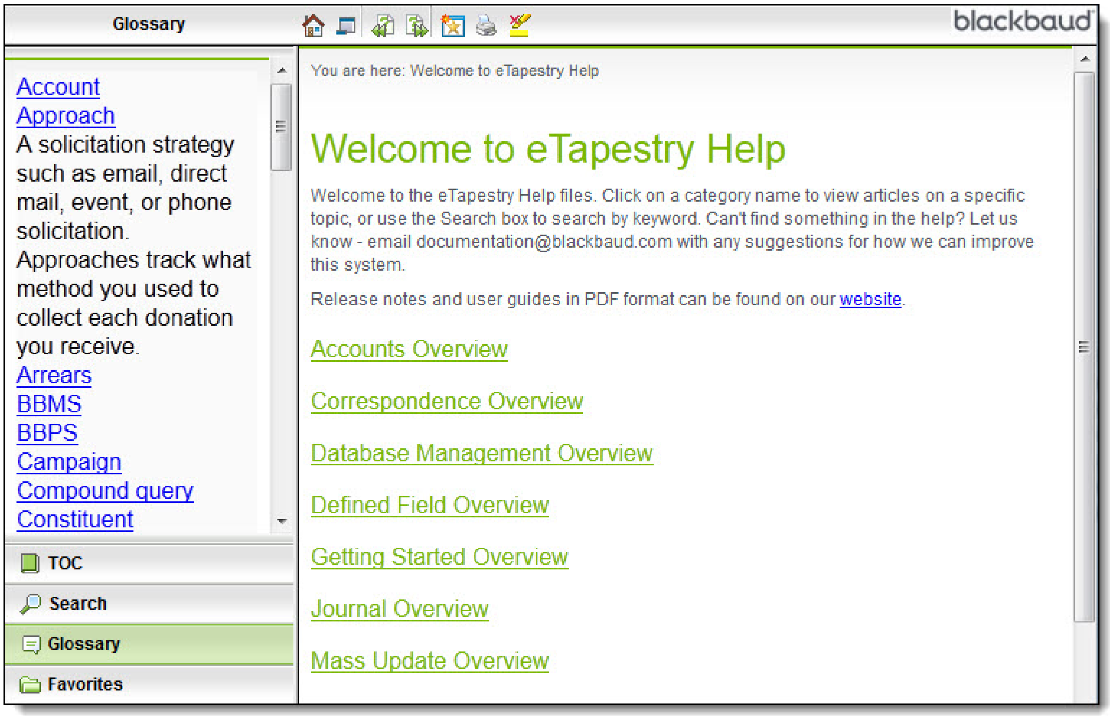
5. On the Options tab, select whether you want to include general and item checkout question responses in the confirmation message.
6. Click **Update**.
7. Click **Next** to save your changes to the template. All email order confirmations will now include questions and answers if these are included in your cart.

New Help Menu and Resources

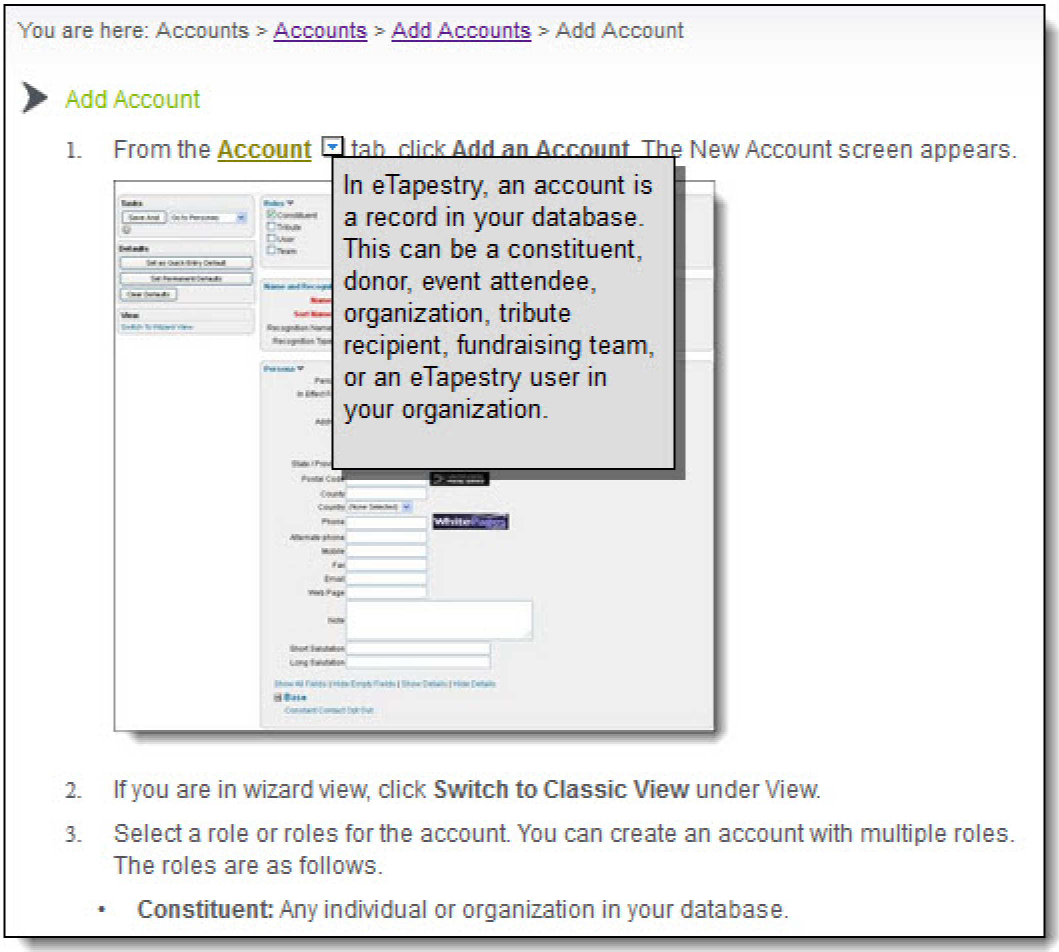
We made the following changes and enhancements to help resources. In the new navigation design, to access the help menu from the top right corner of any screen click **Help & Support**.

New Glossary

We have a new glossary in ***eTapestry*** help. To access the full glossary, click **Glossary** in the left navigation bar on any help screen. To see a definition, click the term you want to define.



You can also see individual word definitions throughout the help content. When a word has a definition, it looks like a hyperlink with an arrow to the right. To see a pop-up of the definition, click the arrow.



Link to Support Resources

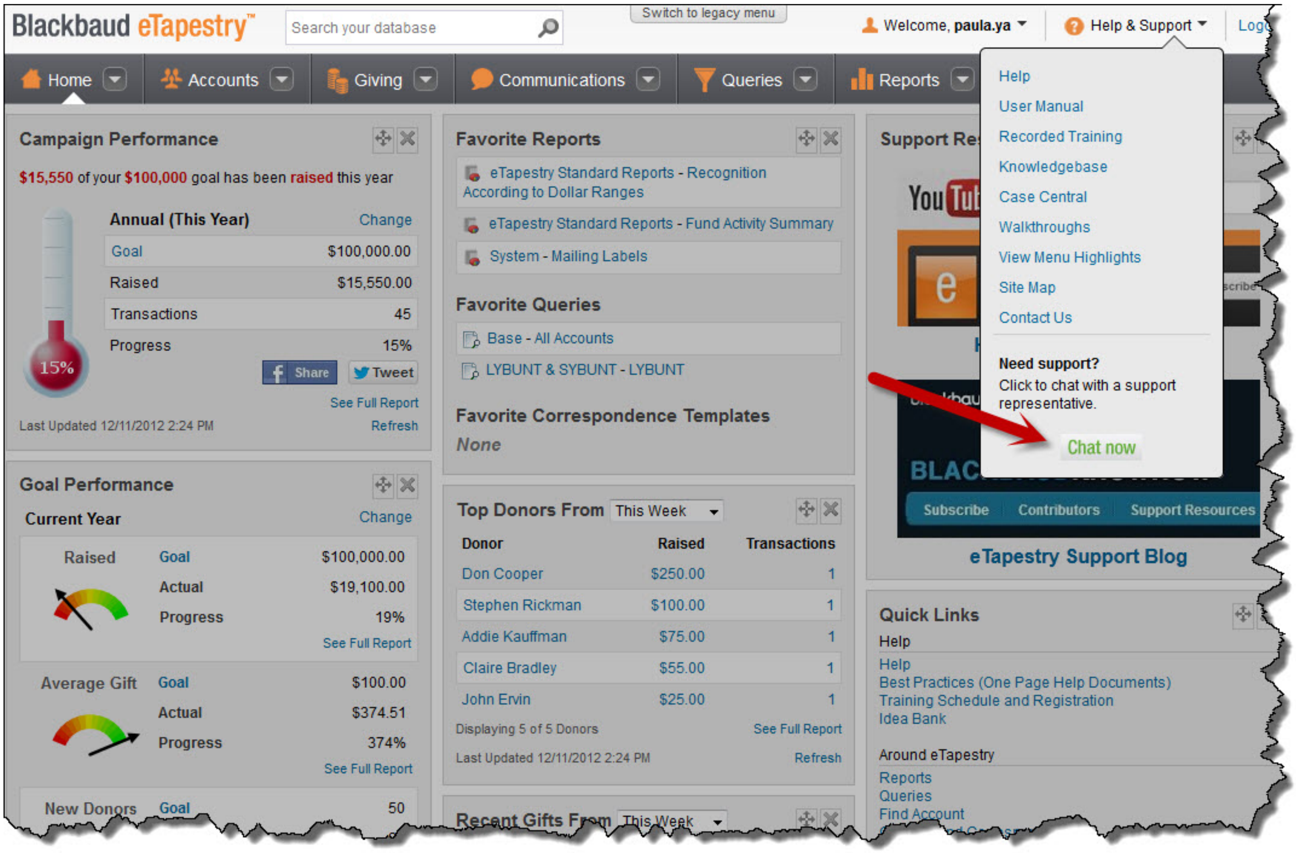
You can now access the [Blackbaud Support website](#) directly from the application. Previously, links in the application presented you with a form to submit to Support.

- To access answers to common questions, click **Knowledgebase**.
- To see your open and closed support cases, as well as to create new cases, click **Manage Your Cases**.

You can also access support resources from the **Help & Support** menu at the top right corner of all pages. On this menu you can contact Support, and access the knowledgebase and case central directly from the application.

Changes to Support Chat

Support chat now includes WebEx functionality, which gives you the option to share your screen with Support for more detailed troubleshooting. To access chat, from the Help & Support menu click the new **Chat now** icon.



Note: If you switch back to the legacy menu, the **Chat now** icon to chat with support is at the top right corner of the screen.